

3. Economic Framework

3. Economic Framework for Planning

The purpose of this section of the report is to examine the general development context within which Catonsville exists and operates. The objective is to identify significant factors affecting the way the Catonsville community works, particularly the primary focus area -- the "village". These include such factors as its location within the region, past and recent development patterns, relationship to other areas and major uses, and so forth.

The information upon which this analysis is based has been derived primarily from the consultant's inspections of the village and other parts of the Catonsville community. The consultants have spent a considerable amount of time in the village, photographing street frontages, observing the relationships of uses to each other, noting the character of structures, and looking at parking and traffic matters. These observations also draw on points made by members of the Catonsville community as expressed at the live public information sessions that were held as part of this study and observations made by the board of Catonsville 2000 in the two work sessions that were held with that organization. They also use some of the data referenced in later sections, including the results of the shoppers and merchant surveys conducted in the course of this study.

A. Catonsville's Regional Context

There is no perfect definition of "Catonsville". Generally, however, it is viewed as that residential, commercial, and institutional community focusing on Frederick Road between the

Baltimore Beltway and the westernmost portion of Rolling Road. On the north, its boundary might be considered Route 40, though that is a little farther north than some would agree to. On the south, the University of Maryland Baltimore County campus, provides a dividing line between Catonsville and Arbutus.

1. **Highway Access.** Several highways significantly affect the development character of the Catonsville area.

- The Baltimore Beltway is a major regional thoroughfare, carrying about 130,000 vehicles per day. It provides excellent access for Catonsville area residents to other parts of the region. It helps bring residents from elsewhere in the Baltimore region to Catonsville. Traffic tie-ups occurring on the Beltway affect traffic traversing the Catonsville community, where some local roads provide perceived alternatives to the Beltway.

- Route 40 (Baltimore National Pike) on the north is also a major regional thoroughfare, but with a strong commercial orientation. While Route 40 continues to carry traffic between the City of Baltimore and points west, at a rate of 55,000 vehicles per day, its greatest significance in this area is as a local service highway for commercial establishments.

- Frederick Road was the earliest regional highway in this area, and was replaced by Route 40. Frederick Road connects south west Baltimore City with Ellicott City. It is

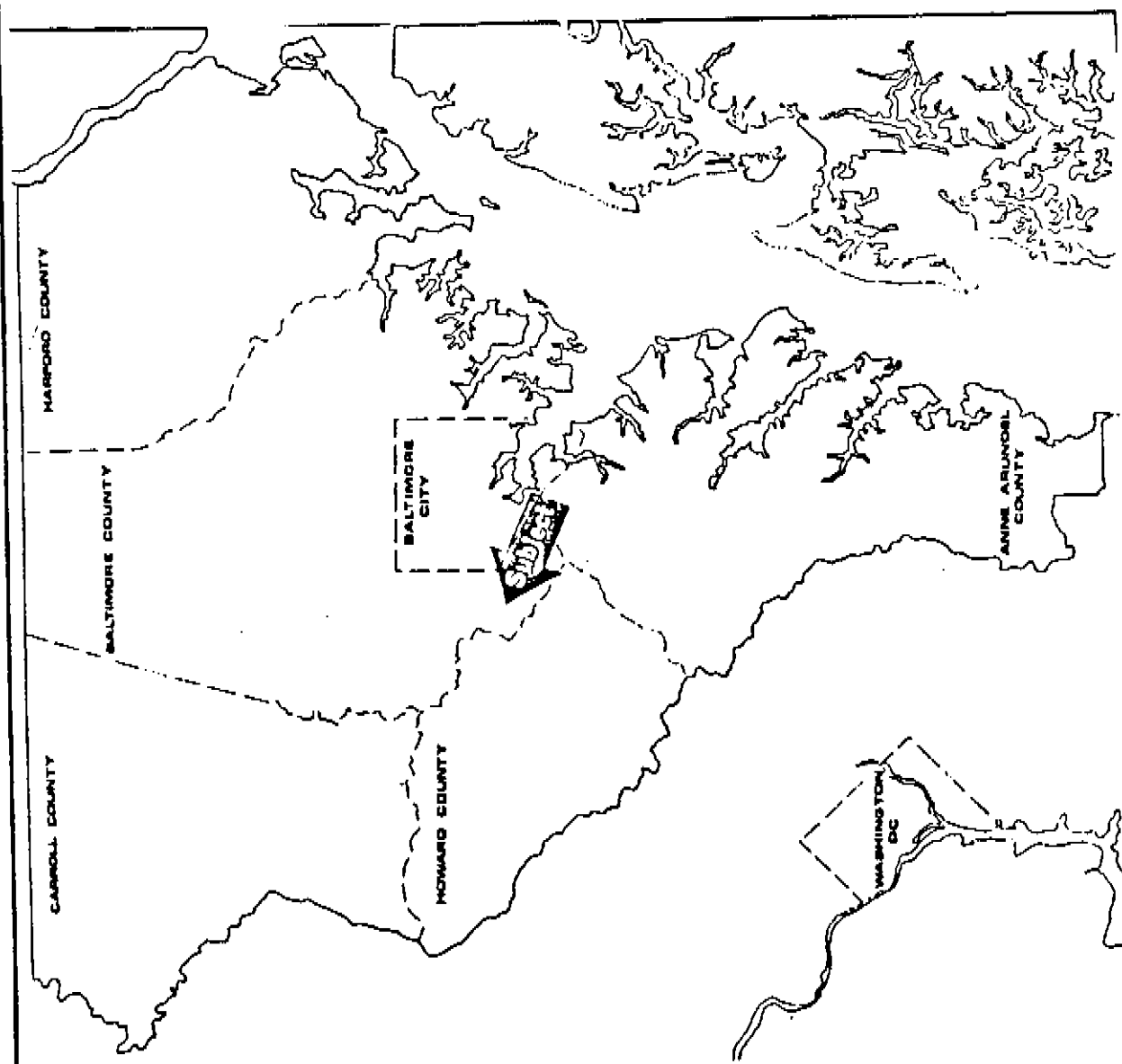
now a primarily a local service thoroughfare, although it does carry some through traffic between the Beltway and northeastern parts of Howard County.

- Wilkens Avenue on the south edge of the Catonsville area is not especially significant west of the Beltway because it dead ends at Rolling Road. However, it is a major commercial thoroughfare connecting the Beltway and the southwest portion of the City of Baltimore.

- Rolling Road is a primarily residential thoroughfare, but carries significant amounts of north/south regional traffic. As mentioned previously, it is sometimes perceived as an alternative to the Beltway. Rolling Road is used by local residents as a means of accessing the western portion of the Catonsville area. Its significance has increased with its connection on the south end to I-195, a limited access expressway providing access to I-95.

Except for Frederick Road, these thoroughfares tend to route traffic around the Catonsville village area, although some would probably debate that observation as regards Rolling Road. These highways provide generally excellent access between the Catonsville area and the region. As indicated in responses to the shoppers survey, Catonsville area residents frequently shop far afield (Owings Mills, Towson, Columbia, Glen Burnie), while at the same time, residents from these same areas shop at some of Catonsville's

This chapter consists largely of economic background analysis, defining what "Catonsville" is and where it fits in the economic and demographic markets. For the most part, this evaluation is on target.



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Emphasis is placed on the "village" character of the Calonsville core, and we agree strongly with the summary statement in paragraph A-4, that it is important to reinforce, not detract from that village character.

especially stores, especially the music stores. The relationship of the village area to the Beltway is considered especially significant in this regard, and is viewed as a positive asset to the village commercial community.

2. Historical Aspects: Calonsville is an older community. It was first developed as a suburban residential village in the late 1800's. This was when Frederick Road was the principal regional thoroughfare. Thus, Calonsville has a long history as a commercial center. It has survived as such during periods of extraordinary change in the economy of the Baltimore region and the structure of regional development. Over the decades, since World War II, development has flowed from the City of Baltimore to the surrounding county areas along highway corridors. Frederick Road served as such a corridor in the early part of the 20th Century. The development of Baltimore National Pike as U.S. Route 40 provided an alternative development corridor.

Significant amounts of Calonsville's land area had been built upon before World War II. Thus, the regional growth that occurred after the war tended to "leap frog" Calonsville. In addition, development of the Beltway opened up other areas on the fringes of the city. Consequently, Calonsville's development in the 1950's and 1960's was somewhat more orderly than in much of the rest of the suburbs. As an area of traditional large homes, much of the development that did occur, after the war,

maintained that character. Complementing this was a mixture of generally moderate to low income families, frequently new to the Baltimore region, and frequently from points of Maryland and West Virginia farther to the west, who found Calonsville a convenient and comfortable residential location. This diversity exists today and represents one of the features tending to make the Calonsville community interesting.

3. Nearby Development Areas: The development of Calonsville has been influenced to some degree by development occurring to the east in the City of Baltimore. The western portion of the city closest to Calonsville is one of generally pleasant, though moderate priced homes. Portions of Baltimore County and Baltimore City along Frederick Road east of the Beltway, are generally consistent with the character of Calonsville, although most of these communities are actually newer in terms of time than Calonsville itself and somewhat tower on the socio-economic ladder. The presence of the Beltway has served to define the western extent of Baltimore City - type expansion and the eastern edge of Calonsville.

To the west, Ellicott City is another community like Calonsville, at least from a commercial standpoint. However, the traditional residential structure around Ellicott City's commercial area is not as strong as Calonsville's, and the commercial area itself is constrained by physical limitations. Nevertheless, Ellicott City serves as a complementary neighbor to Calonsville in helping to reinforce the "traditional" nature of the Frederick Road corridor.

4. Summary: In summary, therefore, Calonsville can be viewed as benefiting from a generally fortuitous location in the Baltimore region with good to excellent access. Its pattern of historical development significantly shapes the way it looks and works today, and needs to be taken into account in the planning process. As revealed through the surveys and public information sessions, residents of the Calonsville area are quite aware of this character, and feel that the most important thing that this planning process can do is reinforce, not detract from, that character.

B. Residential Development Framework

Historically, the Calonsville village commercial district has served a fairly well defined area around it. While earlier in its history, before the Beltway, it was to some degree a regional center, it has not been such for a long time. It does attract shoppers from other parts of the Baltimore region, but the shoppers' survey revealed that the vast majority of shoppers consider it their secondary, not primary, shopping district. This means that the ability of the village commercial district to survive is linked primarily to its ability to effectively serve the population in its traditional market.

Any growth in the commercial district would be linked to growth in the number of people in this

market area and/or the ability of these shops to attract more customers from outside of its traditional market. The latter would probably require that the nature of the retail establishments in the village change to become more acceptable to the broader regional market, operations able to advertise regionally, and businesses with recognizable national or regional names. Based on comments received from the public, Catonsville 2000 board members and respondents to shoppers' and merchants' surveys, this does not appear to be what people want.

This brings the focus back to nearby residential areas. Survivability of the commercial district is linked, therefore, to the survivability of these nearby residential areas and reasonable growth within them or near them. The purpose of this part of the development framework analysis is to assess the character of the residential community in the Catonsville area, its recent growth, and its prospects.

Catonsville has evolved from a small village to estate country, to street car suburb to highway oriented post-war suburb. "Old" Catonsville is essentially built-out, similar to other older suburban villages in Baltimore County such as Towson and Dundalk. Residential development is occurring on the southern fringe of the primary market area along South Rolling Road and Hilton Avenue. Substantially more residential development is occurring in surrounding parts of Baltimore and Howard Counties.

1. Residential Development of Trends: A good perspective on the amount of residential de-

velopment that has been occurring in the Catonsville area can be obtained from an analysis of building permits issued over the past nine years. These data are shown in Table III-1. It should be noted that, while building permits are very useful in an analysis of this nature, not all permitted units are developed. LMRG estimates that, perhaps, 85 percent of the units for which permits are issued are actually built. At the same time, these data do not take into account renovations of homes or conversion of commercial structures to residential. Nor do they take into account subtractions from the residential inventory due to fire, other forms of physical loss, or conversion to non-residential use.

The Regional Planning District (RPD) conforming most closely to the Catonsville market is RPD 324. In the period 1981-1989 (through September), a total of 1,388 residential units were permitted in RPD 324, an average of 154 per year. However, 452 of these units were in multi-family structures, which generally represent special situations. The other 936 were about 40 percent single-family detached units and 60 percent single-family attached (townhouses). Most of the recent development has been single-family detached, with 1989 being the most active year in terms of permits issued for SFD structures. Nevertheless, during the 1980's, an average of only about 40 SFD structures per year have been permitted in RPD 324.

Surrounding RPD's have experienced significantly greater residential development

activity. This is especially true of the eastern portion of Howard County, directly across the Patapsco River from the Catonsville area. Here, almost 11,000 units were permitted during the 1980's, an average of 1,200 per year. A little less than on-half of these were single-family detached. There has been a significant amount of multi-family development in RPD 606, which is the area of Howard County south of the Catonsville area and adjacent to I-95. While this growth has a potentially beneficial impact on Catonsville's commercial area, it is unreasonable to assume that much Catonsville business will be generated by these households. The shoppers' surveys indicated that relatively few people from these areas shop in Catonsville at the present time, and it would seem unlikely that the number would expand unless dramatic changes were made in the nature of Catonsville's retail establishment.

2. Primary Market Area - Residential: The majority of "old" Catonsville is built out, typical of an older suburb. There are very few large, undeveloped residential parcels in the primary market area in private hands with most of the undeveloped land owned by private institutions or the County or State government. Major residential development in the primary market area is concentrated in the southern portion of Catonsville along South Rolling Road and Hilton Avenue in the vicinity of Catonsville Community College. Two large developments are currently active, Patapsco Woods and College Hills.

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The synopsis on pages 3.5-7, section D, accurately reflects the situation for residential development. While additional residential development in Catonsville could assist the economic viability of the Village businesses, traffic and land planning concerns require that new development generally be limited to low to moderate densities.

With the exception of Ellicott City, the vast majority of Howard County was rural until the development of Columbia in the 1960's. Since that time it has developed into an archetypal 1980's suburban county characterized by service oriented employment, large scale and increasingly expensive residential development and a highly educated, wealthy population.

Housing development within the Ellicott City area, along with Elkridge, the most Baltimore oriented areas of the County, has long attracted Catonsville area households,

especially those purchasing move-up housing. Overall new housing in Howard County is among the most expensive of any jurisdiction in the Baltimore region. Virtually all new detached housing is base priced above \$200,000 with some production projects priced well into the mid-\$300,000's.

4. Residential Development Opportunities and Constraints:

- Residential projects developed in Catonsville over the past several years have generally been successful.
- A Catonsville location offers good access to downtown Baltimore, the Baltimore-Washington corridor and Howard County.
- Unlike many other new suburban areas that developed in the post-war period Catonsville has its own functional downtown district, a differentiated, well maintained housing stock, established neigh-

area just north of Interstate 70. The major project here is Parkview Trails which consists of townhouses and single family detached units. The price positions of new housing in the Security area is substantially lower than new home products in the primary market area. Housing products in this area generally target the first-time buyer currently residing in the large number of rental units in this area.

Another major development occurring just south of the PMA is River Chase, a townhouse project located northeast of the I-95/Metropolitan Boulevard interchange in Arbutus. Units here are based priced at \$100,000. In the Westchester/Rockwell areas of far western Catonsville, several smaller scale residential projects have been built over the past few years. Current projects include the 108 unit Westchester condominium and Preakness Falls North townhouses. Small developable parcels have been available in this area and in-fill type projects have been developed on a regular basis this decade.

The amount of residential development in both the primary and secondary market areas in Baltimore County pales compared to development activity within northeastern Howard County. The Howard County portion of the secondary market area is functionally different from the primary market area. Howard County is located within the heart of the Baltimore-Washington corridor and has been one of the fastest growing jurisdictions in the Baltimore region for two decades.

Patapsco Woods is a 185 unit single family detached subdivision located east of Hillon Avenue and west of Catonsville Community College. Units here are selling for base prices in the \$220,000 to \$250,000 range. The principal market for this development are local trade-up buyers. College Hills is a 175 unit luxury townhouse project located on a 72 acre site west of Rolling Road and east of Catonsville Community College. This project, which started construction late last year is selling 24 foot wide units base priced in the \$200,000 to \$210,000 range.

Other developments have been built in the South Rolling Road area over the past few years include Highfields and the initial single family detached section of College Hills. Residential projects developed in the primary market area over the last five years have generally been very successful. Currently there area no other major residential development projects within the primary market area. Scattered development on lots in existing neighborhoods is typical. Other small in-fill projects have been developed within the primary market area in recent years.

3. Secondary Market Area - Residential: Residential development is much more frequent outside of the primary market area. In the Baltimore County portion of the secondary market area the vast majority of this development is occurring in areas that are not considered Catonsville, even given its broadest geographic definition. One development node is in the Rolling Road/Security

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Characterization of the Village business district in section C, is generally accurate. The area is not a primary shopping district and "shoppers' goods" are of relatively minor significance. The Village is a convenience shopping area oriented toward zip code 21228 as its primary market, with a heavy service orientation toward banking and professional services. Additionally, specialty goods sold by the music stores and Plymouth Wallpaper are an important economic segment. The increased orientation toward office and service uses should not be overlooked, since employees of such firms also tend to support the existing retailers as well as providing necessary services to the nearby residential market.

neighborhoods, a racially and economically mixed population and definite sense of place.

- There is a lack of residentially developable land.
- Residents have expressed concerns regarding higher density development.
- There is traffic congestion along major arteries (Rolling Road, Frederick Road).
- Intentions of landowners of major institutional parcels (Children's Home, Spring Grove State Hospital, UMBC) will affect future development.
- Underutilized residential land within downtown Catonsville north of Frederick Road could be developed at moderate densities.

C. Commercial Development Framework

As noted above, Catonsville has had a commercial core area for almost the entire length of its existence. In fact, comparison of photographs of this area today with the early part of the century, reveals an amazing consistency in the physical character of the area.

Frederick Road is the local point of this commercial activity. Commercial development on Frederick Road begins about 600 feet west of the Beltway and ends about 3,800 feet west of the Beltway. Some side streets accommodate significant amounts of non-residential develop-

ment, but, for the most part, the commercial focus is on Frederick Road.

The first few blocks of commercial development west of the Beltway are clearly oriented toward customers using automobiles. Facilities in this area tend to be set back from the thoroughfare with parking in front. They are typical highway-oriented businesses such as gasoline stations, other automobile related services, fast-food restaurants, and business services. The village area's largest general occupancy office complex, the Catonsville Professional Center, is located in this area on the south side of Frederick Road.

At about the Catonsville Elementary School, or approximately 1,800 feet from the Beltway, the character of the commercial strip changes. From this point to the end of the commercial area at approximately the post office building on Sanford Avenue, the commercial character is more typically "urban" with businesses in storefront locations adjacent to the street. To the extent that there is one in Catonsville, the "100 percent corner" (the local point of principal commercial activity) is the intersection of Frederick Road and Bloomsbury Avenue. Between Bloomsbury Avenue on the east and Writers Lane on the west, the village has a strong community commercial center feel.

A wide range of types and sizes of businesses occupy space in this area. They range in size from the extremely large, like the John S. Wilson lumber/hardware complex, to extremely small shops. They include a moderate sized supermarket, several apparel stores, several stores catering to music businesses, florist shops,

restaurants, business services like banks and finance offices, professional offices, and others. Based on the commercial character of this area and the amount of space occupied by these businesses, this shopping complex might best be described as a "community shopping center". That is, it is larger than a pure "neighborhood" shopping center, but not as large or as well structured as a "regional" center.

Unlike a major regional center, this strip lacks a strong general merchandise facility to serve as a drawing card through its size and promotional activities. In fact, many of the businesses do not fall into the important "shoppers' goods" category that covers such things as apparel and furniture. Rather, the commercial context is oriented primarily towards convenience goods or "other retail" such as hardware, and so forth. This is not to say that the area lacks significant business attractions, it is just that these firms do not fit the mold of a regional center. They include Wilson, the music stores as a group and several of the stores individually. Muir's Hardware, Plymouth Wallpaper, the restaurants as a group, and several of the restaurants individually, and several of the clothing stores. Most of these establishments fall into the category of "specialty goods" since they offer rather specialized merchandise and tend to cater to either a narrow market or a highly specialized component of the broader market.

The shoppers' surveys also revealed the importance of the banks as magnets drawing people to the area. There are a number of banks in the village "downtown" and highway strip commercial areas. Visitors tend to combine shopping

with a stop at the bank and, possibly, a visit to a professional office or the post office building. In this regard, the village commercial core functions at a much smaller scale, like a typical downtown.

This downtown character is further reinforced by the fact that there is a significant amount of office space in the village core. The bulk of this is in several large buildings occupied primarily by C&P Telephone Company. The multi-story structure on the southeast corner of Frederick Road at Mellor Avenue is particularly important in this regard. Employees working in these office buildings constitute a reasonable market for retailers.

Although the commercial development focuses primarily on Frederick Road, there is a reasonable amount of such development on the east side of Mellor south of Frederick and on the west side of Bloomsbury south of Frederick. Additional C&P properties, automotive related services, Comcast cable building, and similar type businesses are located in this area. They are physically generally well related to each other. There is some mixing of commercial and residential in this area.

The largest industrial-type space in the area is the Chertkol Business Center on the east side of Mellor south of Meadowbrook Avenue. This building, which was converted from a factory, provides relatively low cost space for wholesalers and distributors and some retail-type functions including an auction house. Most of this space in this center is occupied.

In summary, Catonsville's commercial area is comprised of three distinct components.

- First, there is the highway-oriented strip commercial area on the eastern edge near the Beltway.
- Second, there is the village core area comprised of a mixture of retail, office, and other commercial operations stretching from the elementary school to the post office.
- Third, there is a highly mixed commercial area on the south side of the village core between Bloomsbury and Mellor.

Overall, this area seems to work quite well.

There are extremely few vacancies of any nature, and almost none of retail. There seems to be a good balance between the nature of the spaces, what landlords are charging as rent, and what businesses can pay for the space. Some of the uses, particularly retail firms, are unusual. Many of the businesses occupy what can be described as "found" space, meaning that these are not organized shopping facilities offered by a developer, but rather opportunity spaces occupied by small businesses. This fact seems to have a lot to do with the nature of the businesses themselves, many of which are owner operated and are not part of national chains. Locally owned firms of this nature generally have difficulty paying rents in major shopping centers and seek secondary locations such as the Catonsville village area. Also, many have a long history of presence in and service to this community. As indicated in the public information sessions, it is important that the plan

recognize this character and help to enhance it, not disturb it. Such character is viewed as a general strength of the village commercial complex because it appeals to certain segments of the market and attracts them to the area. Other strengths are the presence of the office space, and, as will be noted below, institutional uses. Some of the weaknesses observed in this commercial fabric are the absence of strong "traditional" drawing cards such as a major general merchandise store or a major supermarket, the unplanned mix of businesses, and the lack of strong central authority to assure that the commercial district functions effectively.

D. Institutional Development Framework

There are a large number of significant institutional uses in the Catonsville study area. These include such large operations as University of Maryland Baltimore County, Catonsville Community College, Spring Grove Hospital Center, and The Children's Home. We would also include in this group Rolling Road Country Club and Catonsville Senior High School. These facilities in essence define the southern edge of the Catonsville community. Combined with Palapsco Valley State Park on the west and such institutions as the Western Vo-Tech Center and Baltimore National Cemetery east of the Beltway, they comprise a swath of open space and institutionally developed space that runs from the city of Baltimore to Howard County. These areas have tended to shape the distribution of development in this part of the Baltimore region, essentially focusing it on the Frederick Road and Route 40 corridors to the north, and

A controversial issue comes to light in section C, last paragraph. Characterizing many of the retailers and service firms as small businesses operating out of "found" space, the consultant views this as an important aspect of the character of the Village and warns against implementing changes that might price these businesses out of existence. While this concern is a valid issue, we contend that investing money in improvements to brighten the face of these establishments, spruce up facades and improve signage may in fact attract new business to these stores and more than pay for itself in the long run. Reinvestment by landlords and merchants on a reasonable scale should be strongly encouraged, if not required.

the Arturus area to the south. Several of these large holdings were identified as "key sites" in the plan request and are addressed in Section VII of this report.

raised in the course of the public information sessions and work sessions with Calonsville 2000 can also be identified at this time. Some of these issues are set forth below.

circumscribed by the Beltway and its northern edge by Route 40. Calonsville is not going to "grow" by expanding into virgin territory. It needs to do the best it can with the land holdings available to it.

In addition to these large holdings, there are many small institutional uses in the study focus area, with a number of these right on Frederick Road. These include the former Middle School property, Calonsville Elementary School, about seven churches, a branch of the Baltimore County Library, the post office, and the National Guard Armory Building.

These institutional operations tend to give structure to the Calonsville community. Institutions are that they are not especially strong direct generators of business for retail and service firms in the core area, but they do provide a locus to Calonsville and attract people to the Calonsville community for various activities associated with them. It is our judgement that the institutions play a stronger direct role in the relative stability of the commercial area of the city than they are given credit. From the standpoint of the plan, therefore, the needs of the institutions should be recognized. It is important that the institutions remain in the Calonsville village area in order to promote continued stability and furnish market support for retailers and other businesses.

E. Development Issues

The analysis above provides the basis for identifying some of the key development issues that must be addressed in this plan. Issues

- The commercial core area of Calonsville is currently operating quite well. The community generally likes the existing character of the commercial core. There are few vacancies and an eclectic, but generally successful, mix of uses. The plan should touch this area gently and not create a situation that might lead to dislocation of existing businesses and significant changes in uses.

- The residential area surrounding the Calonsville commercial core is experiencing only moderate growth. The community has expressed concern about introducing too much new residential development, should that be possible on certain key sites, and other "in-fill" locations. Nevertheless, reasonable continued residential investment is viewed as necessary to assure moderate expansion of the market available to local business establishments without having to penetrate outlying markets that generally do not look to Calonsville as their primary shopping area. Doing the latter would greatly increase the cost of doing business and the risk of business failure.

- The Calonsville market area is largely built out. Its southern and western edges are defined by major public and institutional landholdings. Its eastern edge is generally

- The many institutional uses within the study area make a positive contribution to Calonsville. Their continued presence as operating institutions needs to be encouraged. They help identify the Calonsville community to broader markets that otherwise might have little reason to come to Calonsville. They are appropriate contributors to the village atmosphere that is so enjoyed by the residents.

- The Calonsville village center functions as a small scale downtown. In this regard, it has some of the problems of "downtowns" in the matter of mix of retail establishments. Nevertheless, there are important magnet businesses in Calonsville. In addition, significant amounts of office space help to support the downtown function aspect and provide market for retail sales and service establishments. This is a generally happy relationship and one which the plan should encourage.

- Frederick Road is a major regional highway. From the standpoint of the Calonsville community, however, it is primarily a local service thoroughfare. The plan must be careful to make certain that this latter capability is enhanced and not diminished.